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Dear Sir/Madam:

Thanks you for scheduling an appointment with Morgan & Morgan Attorneys at Law P.C.

Please **fill out the following forms** as completely as possible and **bring them with you** to your appointment. The information you provide will give us a better understanding of your situation.

If possible, please **bring the following items** to your appointment:

- 1) Any billing statements, letters, or court documents you have received from collection agencies, creditors, or attorneys in the last 90 days
- 2) Copies of paystubs or other proof of income for the last 6 months on you and your spouse
- 3) Copies of the contract or other papers you signed concerning any debt
- 4) Copy of the last tax bill on any real estate (land or house) you own
- 5) Copy of your tax returns for the last 2 years
- 6) Copy of your most recent bank account statement
- 7) Any divorce decrees or agreements, if applicable

Please make every effort to arrive on time. If you are late, it may be necessary to reschedule your appointment. If you are unable to attend your appointment, please contact our office as soon as possible to reschedule.

Please try to make other arrangements for small children so that both you and your attorney can focus on the important legal advice you need.

Yours Truly,

Morgan & Morgan
Attorneys at Law P.C.

PERSONAL INFORMATION

Husband's Name: _____ SSN: _____

Wife's Name: _____ SSN: _____

Number of Dependents: _____ Number of People in Household: _____

Street Address: _____

City: _____ State: _____ Zip Code _____

Home Phone: (____) _____ Home Phone Spouse: (____) _____

Cell Phone: (____) _____ Cell Phone Spouse: (____) _____

Work Phone: (____) _____ Work Phone Spouse: (____) _____

Other Phone: (____) _____ Other Phone: (____) _____

Email: _____ Email: _____

YOUR INCOME

Monthly Gross Pay: Husband: \$ _____ Wife: \$ _____

Less:

Taxes and Social Security\$ _____ \$ _____

Insurance\$ _____ \$ _____

Other Deductions\$ _____ \$ _____

Monthly Take Home Pay.....\$ _____ \$ _____

Other Income.....\$ _____ \$ _____

YOUR ESTIMATED MONTHLY EXPENSES

Rent or Home Mortgage Payment\$ _____

Utilities

Electricity\$ _____

Heat\$ _____

Water\$ _____

Phone (Home and/or Cell).....\$ _____

Cable/Internet Service\$ _____

Garbage Pickup\$ _____

Other Expenses

Food\$ _____

Clothing\$ _____

Laundry/Dry Cleaning\$ _____

Newspapers, books (school), etc.....\$ _____

Medical/Drug\$ _____

Insurance: Auto: \$ _____ Other: \$ _____ Total.....\$ _____

Child Care\$ _____

Recreation\$ _____

Club/Union Dues (not deducted from wages)\$ _____

Taxes (not deducted from wages)\$ _____

Alimony or child support\$ _____

Other payment or support of dependents not living at home\$ _____

Automobile Payments\$ _____

Transportation (gas, oil, repairs)\$ _____

Home Maintenance\$ _____

Other\$ _____

Other\$ _____

TOTAL EXPENSES\$ _____

YOUR DEBTS

List **EVERYONE** you owe; even if you dispute the claim. Include your home mortgage, taxes of any kind, medical bills, credit cards, and any other debts. If possible, please provide the **FULL NAME**, **COMPLETE ADDRESSES**, and **ACCOUNT NUMBER**

Creditor Name: _____

Creditor Address: _____

City, State, Zip: _____

Acct. No: _____ Approx. date debt was incurred: _____

Type of debt: _____ Present Balance/Payoff: _____

Property Pledged as Collateral: _____

Monthly payment & number behind: _____

Do you dispute this bill? Yes No

Have you been served with court papers on this debt? Yes No

List name and address of any cosigner or guarantor on this debt, including government agency in case of guaranteed loans, car dealer if dealer arranged purchase financing, or anyone who may have cosigned or guaranteed a loan: _____

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